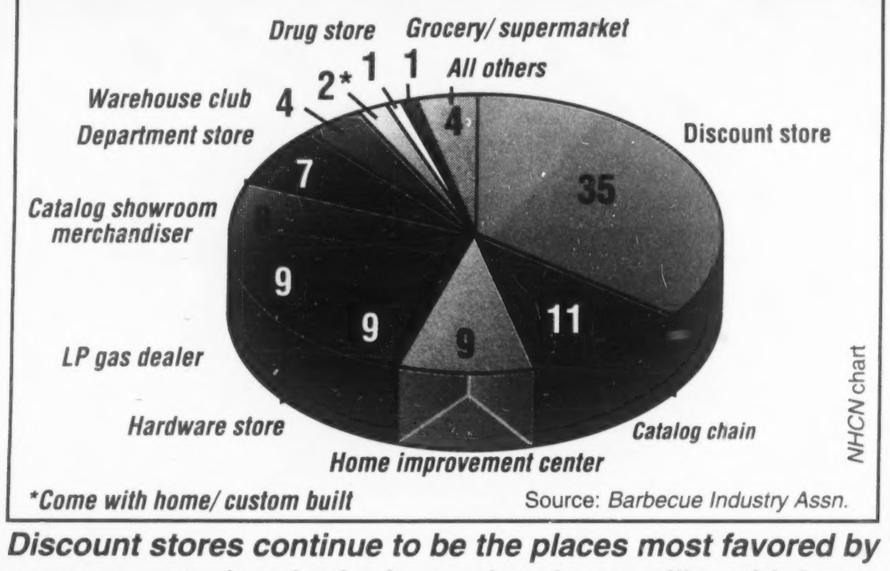
INDUSTRY STATS

Where consumers go to buy gas BBQ grills
(% of purchases captured by retail segment)



*Come with home/ custom built

Source: *Barbecue Industry Assn.*

Discount stores continue to be the places most favored by consumers to buy both charcoal and gas grills, with home centers capturing about 9 percent of gas grill sales.

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Western Lumber left with one retail store

NATIONAL CITY, Calif. — Western Lumber, once a dominant lumberyard chain in San Diego County, has closed the retail store at its Temecula yard and is contracting out what little business is left at its truss yard here.

Western is now left with one retail store and full-service lumberyard in Oceanside. The Temecula location still operates its yard for contractors only, said executive vp E. Michael McMahan.

McMahan said there just wasn't enough retail business to keep the store open and home building in the area has slowed so dramatically that the company couldn't possibly operate its truss plant.

Five years ago Western had 11 yards, but the lack of residential construction and tough economic times forced the company to start closing units and laying off employees.

Last April, Western's former president, Newell Lavoy, left the company to accept a position as president of Builderway Inc. McMahan assumed Lavoy's responsibilities, in addition to serving as chief financial officer.

Western Lumber still has not replaced Lavoy and currently has no plans to do so, McMahan said.

Home Depot gets set for Midwest entry

OAK BROOK, Ill. — Home Depot officially enters the Midwest on Aug. 1, when it is scheduled to open a real estate office in this Chicago suburb.

Michael Folio, manager of the 185-unit, Atlanta-based chain's real estate operation in Florida for the last 2 1/2 years, will be in charge.

A spokesman for Home Depot said there were no immediate "market priority plans" yet for the Midwest, meaning that the company has yet to identify which cities would be the locations for Home Depot's first stores.

This source reiterated Home Depot's plans to have two stores in the Midwest by the end of 1994 and as many as 50 stores up and running by the end of 1996.

NEWS BRIEFS

Lowe's defies industry woes as sales jump

NORTH WILKESBORO, N.C. — Contrary to complaints by many dealers in the industry that their sales had fallen off after early April, Lowe's Cos. reported a 20 percent gain in its business in June to $313.8 million.

The 305-unit chain said a sizable portion of that increase was attributable to the 23 percent jump in retail sales to $217.8 million. Retail transactions accounted for 69 percent of Lowe's total volume in that month.

Even the company's contractor sales rose by 14 percent to $96 million in June, an indication that parts of the Southeast were shaking loose from the home building slump that pervades much of the nation.

Sales at the 275 stores Lowe's has had opened for more than a year grew in June by 13 percent to $261.5 million. And the company saw a huge increase in business from those outlets that have more recently been opened or been made larger through remodeling or relocation. In June, these sales skyrocketed 99 percent to $51.4 million.

In this period, Lowe's opened relocated stores in West Richmond, Va.; East Asheville, N.C.; West Columbia and Anderson, S.C.

Georgia-Pacific vice chairman calls it quits

ATLANTA — Realizing he would not succeed to the post of chief executive officer, the vice chairman and a board member of Georgia-Pacific Corp. chose early retirement effective July 31.

Ronald D. Hogan, who had been with the forest products concern since 1965, announced his resignation June 29.

"When it was clear, after numerous discussions, that it was unlikely Ron [Hogan] would succeed to the ceo position . . . we decided his early retirement would be mutually beneficial," said G-P's chairman and ceo, T. Marshall Hahn Jr., in a prepared statement. "Ron Hogan has been a valuable member of Georgia-Pacific's executive management team," Hahn said.

There were no plans to fill the post of vice chairman.

Photo courtesy of *Working Woman*

Working Woman's *Jeri Sedlar*

Women's group picks Hardware Show speaker

CHICAGO — Jeri Sedlar, editor-at-large of *Working Woman* magazine, will be the featured speaker at Women in the Hardware Industry's upcoming luncheon next month.

Open to both members and non-members, the networking luncheon will take place during the National Hardware Show at McCormick Place here.

Sedlar, who motivates women around the country to reach their highest personal and professional goals, will address the topic, "What Women Can Expect in the '90s."

For reservations and additional information, please contact Lori Williams Kirby at (313) 744-4500.

S. Calif. dealers recover from recent quake

YUCCA VALLEY, Calif. — Builders Emporium's store here experienced significant damage when the unit was jolted by last month's earthquake.

The quake, which measured 7.4 on the Richter scale, was centered just miles from the store.

Most of the merchandise fell off the shelves, yet all of the fixtures remained intact. The store was shut down for a week as a hazardous materials crew worked on cleaning up the mess and resetting steel supports, said Darrell Heun, BE's vp-marketing and store planning.

The shaken store, which just opened eight months ago, is one of the chain's new reformatted units.

HomeBase offered victims of the June 28 earthquakes a 10 percent discount on all merchandise sold at its warehouse home centers in San Bernardino, Palm Desert and Victorville. The discount was granted upon request from July 3 through 12.

The stores also accepted disbursement vouchers issued by the American Red Cross, good for buying construction materials, building supplies and assorted other items.

Green DIY to add unit; execs run Irish chain

UCKFIELD, England — Green DIY directors Ted Lansdowne and Doug Spickernell will be adding their first franchise store this fall, and are now running a four-unit company called Woodies diy in Ireland.

Both were called in 18 months ago as consultants by Woodies' Irish parent, Grafton Group plc. Woodies stores range from 14,000 to 32,000 square feet and target only DIYers. The company generates £10 million in revenues.

"Woodies was badly managed, badly ranged and had no margin control," said Lansdowne, who expects the company to break even this year. Having overhauled the management and systems, the two execs are preparing to roll out three more units in Dublin by year-end.

Their own business, Green DIY, will open its first franchise store in Kent, in southeast England, run by two former Payless DIY managers. This 10,000-square-foot store is slightly bigger than the flagship units but will have the same computer systems, software programs, product range and share in advertising costs.

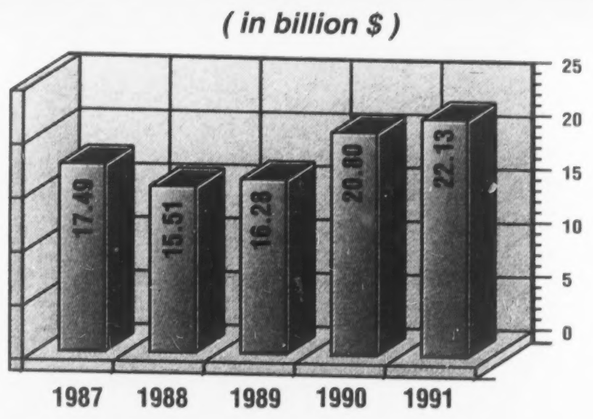
HomeBase parent seeks $100M capital

NATICK, Mass. — Waban Inc., HomeBase's parent company, will offer $100 million of convertible subordinated debentures, due 2002.

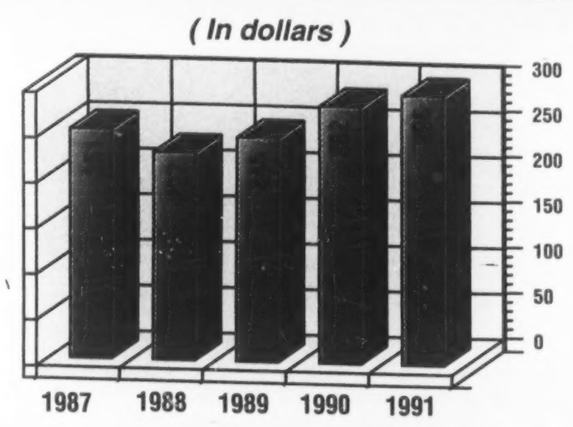
The notes, approved for listing on the New York Stock Exchange last month, are convertible into common stock of the company at a conversion price of $24.75 per share. They cannot be redeemed before July 15, 1995.

Waban, also parent to BJ's Wholesale Club, will use the net proceeds of the offering to support the company's expansion program.

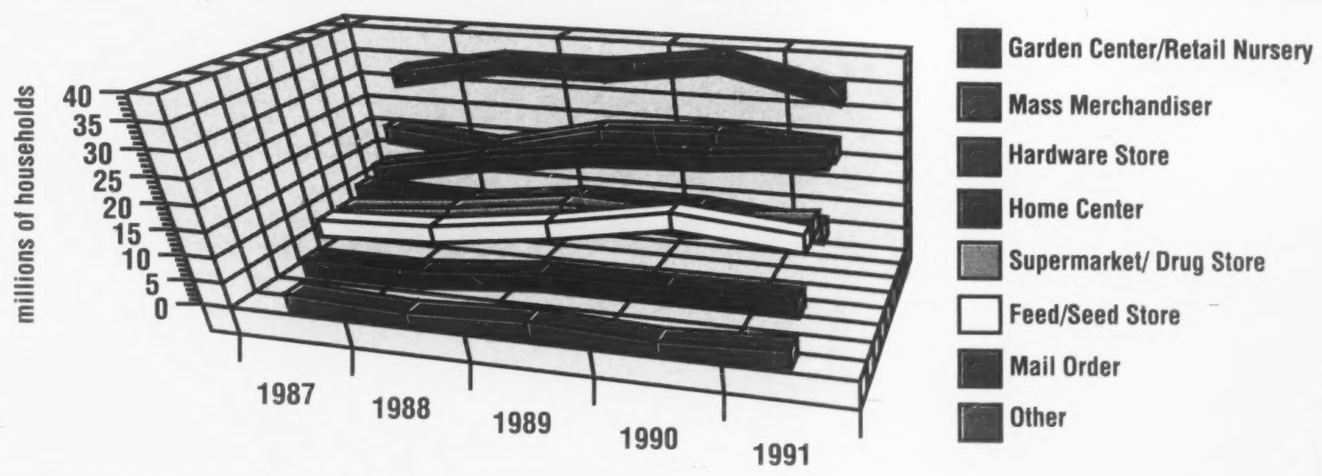
Trendline: U.S. Household Lawn and Garden Retail Sales 1987-1991



Trendline: Average U.S. Household Spending on Lawn and Garden Activities 1987-1991



1987-1991 Lawn and Garden Retail Outlets



Source: National Gardening Association.

NHCN charts

Home centers may have lost some ground as preferred places for consumers to shop for lawn and garden products last year.

The number of households estimated to have shopped in a home center for these products declined by 10.5 percent in 1991 to 17 million, according to nationally projectable research, based on interviews with 2,000 households, completed for the National Gardening Association (NGA) by the Gallup Organization.

Total retail lawn and garden sales at all outlets grew by 6.4 percent to $22.1 billion in 1991, compared to the 27.7 percent sales jump achieved in 1990 versus 1989, and 4.9 percent in 1989 over 1988.

"Six percent growth is good compared to other kinds of retailing," said Bruce Butterfield, NGA's research director. "But the only sales increase [by retail group] last year was by mass merchants, which tells me that people are counting pennies."

Last year did show some strengths. Landscaping sales rose sharply, by 26 percent. And vegetable gardening sales increased by 19.4 percent, which Butterfield attributed to recessionary times. "We saw these same kind of increases during the last two recessions in 1981 to '82 and 1974 to '75," he recalled.

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Improved seed varieties engineer higher sales

(Continued from page 9)

Bound Brook, N.J.-based Lofts Seeds that's been enhanced with endophyte, an insect-resisting fungus. Other marketers with improved products include O. M. Scott & Son and Pennington Seed.

Other seeds 'improved'

The effort to build better seeds isn't restricted to turf grasses. In response to consumer demand, flower and vegetable seed growers, such as Warminster, Pa.-based Burpee, are marketing seeds that produce hardier and, often, more compact plants, including dwarf varieties.

For home centers, seeds can be important business. Homeowners shell out an estimated $100 million for grass seeds at all retail outlets each year, and perhaps another $200 million for flower and vegetable seeds, according to growers contacted by *NHCN*.

According to one vendor, a large home center store such as one operated by Home Depot can move up to 100,000 pounds of grass seeds a year; smaller stores might sell about 30,000 pounds.

Sales sprouting

The profitability of the product, then, could be considerable, as some "engineered" grass seeds can retail for as much as $4 or more per pound (compared to less than $1 for a common, unimproved variety), and dealers can capture gross margins of 35 to 40 percent.

Sales in the seed category this year have been up significantly from last year for a number of retailers. At San Antonio-based Builders Square, grass seed sales are up 30 to 35 percent, according to Roger Hittinger, divisional merchandise manager.

At Ace Hardware, meanwhile, sales to its dealer-members of all seeds are running "a little over 20 percent" ahead of last year, says John Poss, lawn & garden buyer. Improved varieties have performed even better, with some dealers reporting increases of 40 to 45 percent.

One reason for the sales upswing: last year's severe drought conditions, which ruined lawns in many areas of the country.

Still, consumer education remains the big challenge for retailers looking to capitalize fully on these improved, higher-priced seeds.

With knowledgeable salespeople at a premium in any seasonal department, some dealers have to rely on packaging as a key selling tool.

"The package will have to tell the customer why that type of seed will cost him a bit more per pound," says Poss of Ace Hardware.

Many products bear catchy names to help consumers instantly identify their main benefits. Scott's Shady Splendor and Emerald Estate are two examples. But not everyone agrees that packaging alone will do the trick.

"It's something that needs to be verbally explained and merchandised," says Pat Whitney, merchandise manager at Kansas City, Mo.-based Payless Cashways.

To cash in on the trend, some retailers use seeds as traffic builders that are especially effective when promoted in ads and with endcaps.

Builders Emporium, for one, likes to sell seeds in combination with other green goods in theme promotions such as "Fall is for planting."

Retailers agree that once consumers become better educated about the benefits of improved seed varieties, sales are likely to jump.

In addition, recent advances in bioengineering could well put a new focus on the category. Though now primarily focused on agriculture-use products, bioengineering—essentially gene-splicing that improves on traditional cross-breeding methods—will eventually filter down into the gardening consumer market, says Ellen Henke, a TV personality and garden industry consultant known as "America's plant doctor." One example of what the future might hold: blue roses.

While retailers say they expect a strong fall season in seeds, the picture is less clear for next year. With drought cutting into this year's seed crop, seed marketers have already warned of higher wholesale prices that could adversely impact retail activity. As some people in the seed business muse, when you're trying to fool Mother Nature, Mother Nature sometimes strikes back.

Top dealers cultivate lawn & garden image

(Continued from page 1)

The greenhouse is stocked with flowering house plants, tropical plants and delicate plants that do not do well outside. Automatically controlled shades control the sun and the heat, and a $150,000 drip irrigation watering system keeps the plants watered.

Aikenhead's in Toronto has a similar 6,000-square-foot glass-enclosed area that in the summer opens up to the 12,000-square-foot outdoor nursery and enables the Canadian warehouse retailer to expand its season by bringing in mums and Easter lilies in early spring.

Dealers have experimented with various forms of shade canopies for some time to protect the plants. Builders Square in its Southern markets is testing a Weathershade canopy that blocks out 60 percent of the light. This has drop-sides for the winter months so the store can bring in color plants without damage, according to George Tate, garden buyer for the San Antonio-based warehouse chain.

As home centers compete with garden centers, supermarkets and drug store chains for live plant sales, they are adding dedicated merchants and nursery staff to give them an edge.

HQ, for example, recently added a merchant to buy all live goods. This enables the Virginia Beach, Va.-based company to source better and to promote different species without price averaging. HQ now carries 1-, 3-, and 5-gallon azaleas so it can promote one size and maintain higher margins on the other two, according to Mike Pastore, senior vp and general merchandise manager.

There is a horticulturalist on staff at independent Santa Barbara Home Improvement Center in Southern California, where lawn and garden sales represent 35 percent of the store's total annual volume.

Santa Barbara beats out local nurseries by buying in bulk and keeping prices low, according to purchasing manager Clark Evans.

Until recently, specialty outlets beat home centers because of the services they offered, though some chains are trying to change that situation now.

In a recent customer survey, Simon Stores—the Walnut Creek, Calif.-based independent—found that the number one customer demand was for a garden design service. Next spring, the two-unit company will offer both a design service and installation.

The company, which introduced installed sales to other departments nine months ago, will offer installation for irrigation, landscaping, decks and even patio doors.

"We have credibility in the marketplace. All of this project business is based on the expectations of the customer and meeting those needs," said Simon's president, Marc Kaplan. "The difficulties of implementing that are a tough business, but it's one of the only ones left."

Ernst Home & Nursery this year has boosted its lawn mower sales by 20 percent and wheelbarrow sales by 35 percent by offering them already assembled for no extra charge, according to Bill Crayton, the Seattle-based chain's vp-merchandising.

Another area of improvement has been in stores' product mixes. As part of its redesigned store format, Rickel Home Centers in New Jersey "got deeper into lawn and garden repair items, like fertilizer that is needed two or three times a year and brings more customer traffic," stated Tom Vertetis, executive vp-merchandising and advertising.

Rickel's competitor, Channel Home Centers, expanded its bag goods program by adding 14- and 15-pound bags of grass seed and emphasizing brand names, according to Jeff Gross, seasonal buyer.

The Top 20 Lawn & Garden Retailers in 1991

Company	$ Mil Sales	% Change
1. K mart	820	3
2. Wal-Mart Stores	544	17
3. Frank's Nursery & Crafts	518	2
4. Cotter & Co. (True Value)	480	7
5. Ace Hardware	385	0
6. Lowe's	358	N
7. ServiStar	254	3
8. Home Depot	210	52
9. Payless Cashway	203	1
10. Builders Square	180	6
11. Sunbelt Nursery	143	– 1
12. Hechinger	119	– 7
13. HomeBase	115	5
14. Builders Emporium	113	1
15. Kroger Co.	106	0
16. Wickes Cos.	100	0
17. Grossman's	79	0
18. Earl May Seed & Nursery L.P.	63	0
19. Scotty's	58	0
20. Pike Nurseries Inc.	45	8

Source: *Nursery Retailer* — *NHCN* chart

Dealers want bigger bite of pet supply market

(Continued from page 5)

ing group that markets pet supplies through its V&S Variety store division. "We've really only scratched the surface."

Most hardware stores typically carry some pet items, and Cotter has found that its dealers sell about our times as many products for dogs as cats. Zuccollo noted that hardware stores usually stay away from bird and fish products.

Into the doghouses

Home centers, on the other hand, are more likely to carry only those products, like kits to make pet doors and doghouses, that have some building materials application.

For example, Dogloo, a five-year-old supplier of igloo-shaped doghouses, has been "moderately successful" penetrating the home improvement market, stated John Burns, manager of customer service.

The Corona, Calif.-based vendor sells three lines, retailing for between $50 and $90. These are distributed through hardware co-ops such as Cotter and Ace Hardware, as well as home center chains from Home Depot and HomeBase to Handy Andy, Lowe's and Builders Emporium—chains that don't carry any other pet supplies.

Home centers still tend to resist carrying these products in large quantities, mostly because they think pet supplies dilute their stores' image.

Orrville Leather, a leading full-line pet supply vendor based in Ohio, sells its products through more than 100 hardlines distributors—including California Hardware, RKB Enterprises and Emery-Waterhouse—as well as the industry's five largest dealer-owned buying groups.

But Orrville currently does not sell any home center retailers. "Lord knows, we've tried," lamented its vp-sales, Tom Kister.

"These companies are always asking for something new and different, but they shy away from pet supplies," he explained, somewhat bewilderedly. Kister said he can't assess to what extent home centers that are customers of these distributors are flirting with pet supplies.

"Home centers are a new market for us," said Ken Humpert, president of Flexi USA, a Cincinnati-based supplier whose retractable dog leash has sold well with the co-ops. Three skus of this product are being carried by Chase-Pitkin's 12 stores in upstate New York. Flexi's most popular leash retails for $18.

Dealer overload

Home improvement retailers entering the pet supply market do so at their own risk, as it sometimes seems like virtually every kind of retailer sells this stuff.

Aside from supermarkets and mass merchants, which usually carry a wide range of supplies and food, there are pet stores that inhabit nearly every mall in America.

Specialty retailers accounted for about $2 billion of total retail sales in 1991 but experienced a 15 percent decline in business, according to Hugh Bishop, *Pet Supplies Marketing*'s editor.

This group includes Petco, the San Diego-based chain that, with 184 outlets averaging 5,000 square feet, is the industry's largest; and PetsMart, based in Phoenix, with around 40 stores that average more than 20,000 square feet. However, Bishop said the typical specialty store is 1,650 square feet and does $250,000 in annual sales.

"What I've noticed is that our customers are so different" from home improvement consumers, said Craig Walker, Petco's vp-advertising, who until late May was vp-communications for Standard Brands Paint Co. "It's most important to these pet owners to get quality products and help from people who can show them how to care for their pets."

Walker isn't convinced home centers or hardware stores can or will provide that level of service, although he concedes such things as pet doors and doghouses could sell easily in home centers.

Other competitors in this field are farm and fleet stores, which Bishop said have "evolved" to include pet products, and lawn and garden outlets, which, in recent years, have begun stocking full-blown pet supply departments.

Some products suitable

Given the sheer number of competitors, home centers and hardware stores entering the field need to have some distinctive products and programs to attract pet lovers as customers.

"Home centers have to advertise and promote the products, let people know what they carry and give the products sufficient shelf space," said Humpert of Flexi USA.

Zuccollo of Cotter, which offers its dealer-members planogrammed pet supply programs in 4-, 8- and 12-foot runs, thinks home improvement dealers usually carry better-quality merchandise than is available through grocery stores or discount outlets.

He also thinks some pet items are conducive for sale with building products, such as wire kennels and kits to build cedar doghouses or cut a pet door into an existing entryway.

Zuccollo also pointed to a product called "Radio Fence," which allows homeowners to set up an invisible barrier around large yards. It involves installing a wire under ground that's hooked up to an electronic device which transmits an electric current to another device in the pet's collar. The jolt causes no pain but, through conditioning, tells the pet not to go beyond that point.

Radio Fence retails for $599, and Zuccollo said it got an amazingly high response from Cotter dealers at the co-op's spring buying show, "even though we offered it with no fanfare; it wasn't even listed in our price book."

This product has been promoted by a number of home center chains, including Home Quarters Warehouse.

Nevertheless, pet supply vendors find home center dealers to be a very tough sell. "We tried, at one point, to develop a package for cables, leashes, tieouts and trollies that could be sold with chains in home centers, but it didn't work," said Orrville Leather's Kister.

But although he said he's "given up trying to sell programs," he's not giving up on home centers as customers. "One of these days, a big retailer is going to take a chance on some part of our program."

ITC upholds Canadian timber duty

Ruling should have little impact on lumber prices

WASHINGTON — The International Trade Commission (ITC) vote sustaining the 6.5 percent duty on Canadian softwood exports to the U.S. should have little additional impact on lumber prices.

As expected, the ITC vote reaffirmed U.S. producers' allegations that Canada subsidizes its timber industry. A 14.9 percent countervailing duty in place in one form or another since earlier this year resulted in a 7 percent hike in lumber prices, according to an industry trade group made up of U.S. producers. Since the first quarter, lumber prices have fallen.

The Canadian government intends to appeal the June 25 decision setting the duty at 6.5 percent, according to published statements.

According to the Coalition for Fair Lumber Imports, the U.S. lumber industry group which sought the action, the new duty would add just $100 to the cost of a new home but would save as many as 15,000 timber-related jobs. The Washington-based Coalition believes the tariff will be increased as the ITC investigates Canada's subsidy structure further.

CBS continues bailout talks with ServiStar

(Continued from page 1)

Additional talks between CBS and ServiStar were slated for July 8. Details of the deal, for which ServiStar will pay an undisclosed sum, were not available.

It could not be ascertained whether ServiStar would try to set CBS up as a separate entity similar to what ServiStar did after it bought the assets of Coast to Coast Stores in 1990.

Interest from other groups

The arrangement could mean that Central Builders Supply's 280 dealer-members would have the financial foundation of ServiStar's multi-million-dollar credit line to back up their merchandise ordering. The members would probably be offered ServiStar membership.

Knowledgeable sources said that buying group competitors ranging from Progressive Affiliated Lumbermen—a Grand Rapids, Mich., broker—to Hardware Wholesalers Inc.—the Fort Wayne, Ind.-based dealer-owned co-op—were trying to sign up CBS' stronger yards.

Van Conway, CBS' interim president, said CBS, as a legal entity, would "wind down" after it paid off about $15 million in current vendor debt. It was unknown how CBS would settle millions of dollars worth of bad debts from members going back as long as two years.

According to CBS documents, its dealers owe the group between $5 million and $6 million in bad debts. One transaction had CBS pledging $3.6 million in certificates of deposit as collateral to a North Carolina Bank so the bank would lend a CBS member, Sinclair Lumber Co., $2.7 million the dealer owed to CBS.

Other debts, like the $218,000 owed to CBS by the now-defunct wholesaler General Hardware of Atlanta, are probably uncollectible.

According to CBS bylaws, bad debts will be billed to remaining and recently resigned members. Going on the premise that the debts will not be paid, CBS' remaining 280 dealers would have to come up with between $17,857 and $21,428 each.

To recoup overpayment of rebates from 1988 to 1991, dealers will be billed about $4,900 this year. Dealer-members were also informed, in a letter sent in June, that they will be billed $3,900 to $5,900 each in September to cover the broker's expenses.

It was unknown how the merger will affect these receivables and overpayments, which are believed to be needed to pay trade debt.

Blame assessed

Former senior managers of CBS allowed receivables to accumulate in the hope of increasing sales (*NHCN*, July 6). Bret Pobanz, CBS' president, who was ousted last month, said the deals that threw CBS into a cash shortage "couldn't have been done without the board's support." Board president Mike Webb, an Illinois lumber dealer, said he knew nothing of the deals. Pobanz declined further comment.

Steve Boone, the former vp-sales whose job was eliminated by the board last March, laid blame for CBS' money problems on former vp-finance Weymann Nedbalek, who left the firm in January.

According to internal CBS documents and an interview with Boone earlier this month, Nedbalek told Pobanz and Boone a new computer system prevented him from knowing about the mounting member receivables.

Nedbalek, reached by phone in College Station, Texas, said both Pobanz and the board knew of the company's problems but "failed to act."

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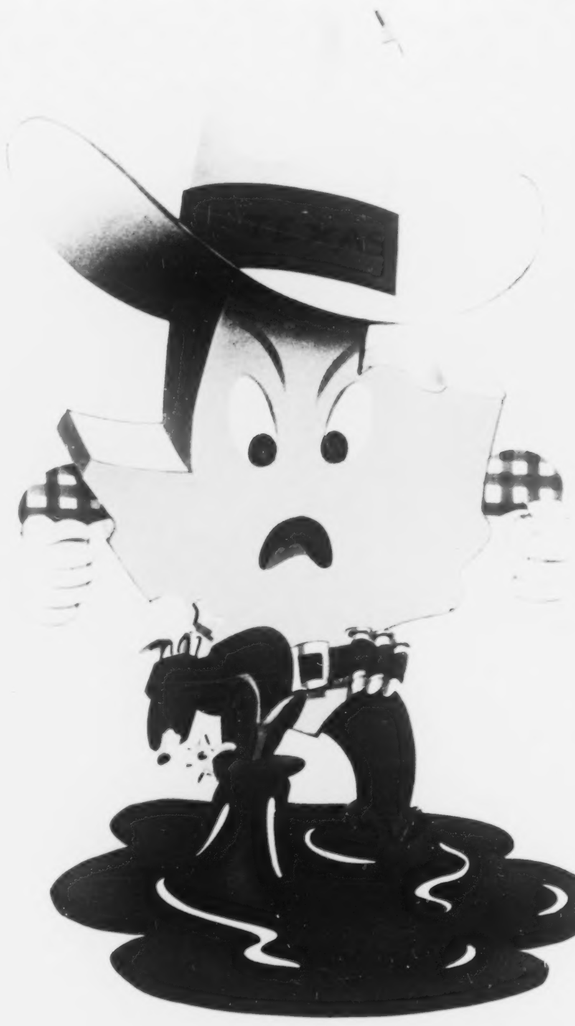

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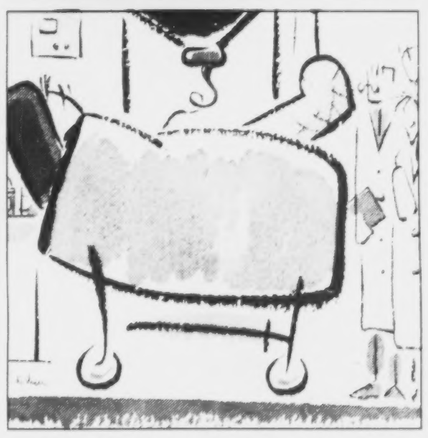

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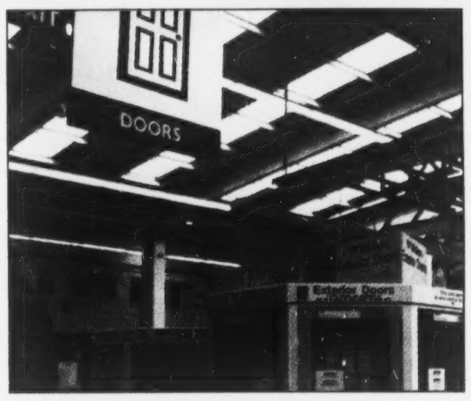

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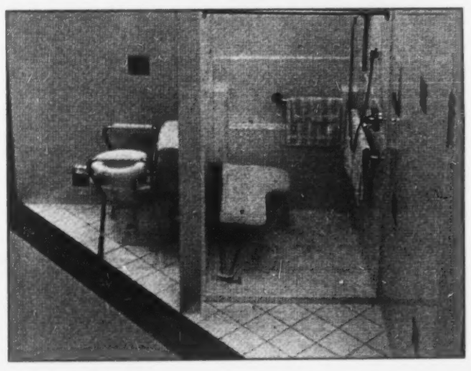

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NEWS BRIEFS

HomeBase adds Midwest buying office

CALUMET CITY, Ill. — Homebase's Midwest buying office is up and running at the chain's regional office here.

The Fullerton, Calif.-based retailer added its new buying office to help facilitate the company's expansion in the Midwest.

"Our merchandise manager and buyers in the Midwest can tailor HomeBase's merchandise selection to regional needs and building codes, while at the same time seeking out local merchandise suppliers," explained president Jim Halpin in a recent news release.

Bob Galant, regional merchandise manager, is responsible for the assortment of product supplied to HomeBase's stores in Illinois, Colorado, Idaho, Ohio and Utah.

The new buying office is headquartered at this 150,000-square-foot store, one of the company's largest units. The Calumet City store and office opened in April, along with four other Chicagoland stores.

Quojem to reach out to pro segment

PARIS — The management of Quojem, the International Hardware, Tools and DIY show, which takes place here next month, is attempting to broaden the event's appeal to the professional/commercial distribution market segment.

The show will cover 750,000 square feet of exhibition space and include the following product categories: hardware, tools, garden, plumbing, electricals and decoratives.

Besides France, exhibitors are expected from Canada, Germany, Great Britain, Italy, Japan, Taiwan and the United States, including a pavilion sponsored by the American Hardware Manufacturers Association.

Quojem takes place September 20 to 23 at the Paris-Nord Exhibition Grounds. For further information, contact Julie Halas, IMEX Management, (301) 942-5857; (301) 946-3858 (fax).

Home Depot expands New England market

ATLANTA—Home Depot continued its push into New England last month with the opening of the Danvers, Mass., and South Attleboro, Mass., units.

It now has 11 stores open in the market with four more under construction. It will open in Orange, Conn., in August, Salem, N.H., in September, Quincy, Mass., in October, and Somerville, Mass., in November.

It plans as many as 25 stores by 1996 employing 4,500 people.

Talk to offer strategies for retailers

COLLEGE STATION, Texas — Bruce Berg, president of the southeast division of Home Depot, will be among the featured speakers at the tenth annual Special Topic Symposium sponsored by the Center for Retailing Studies at Texas A & M University.

The event is scheduled for October 22 and 23, at the Adolphus hotel in Dallas.

This year's theme is "Excellence in Retailing . . . Best Practices." Berg's talk is titled "Building an Achievement Culture."

A luncheon address on "Global Best Practices in Retailing" will be given by Stanley Marcus, chairman emeritus of Neiman-Marcus and Larry Katzen, managing partner-worldwide retail industry practice, Arthur Andersen.

For details, contact the Center for Retailing Studies, Department of Marketing, Texas A&M University, College Station, Texas 77843-4112, phone (409) 845-0325.

COMMUNITY SERVICE

Seigle's helps build home for local family

ELGIN, Ill. —Seigle's Home & Building Center is working with Habitat for Humanity to build a 1,000-square foot, three-bedroom ranch home for an Aurora, Ill., family.

The eleven-unit retailer is donating more than $15,000 in building products including all of the lumber, trim, doors and windows needed to complete the project.

Volunteers from Habitat for Humanity will build the house in two sections at Seigle's store in Aurora. Once completed, the sections will be transported to the site, where a foundation will be prepared.

Seigle's will hold six workshops for its customers while the work is in progress. In this way, customers can learn about carpentry, plumbing and other aspects of the building trade by watching the home being built.

Mark Seigle, vice president of Seigle's, said that the company chose to work with Habitat for Humanity because they saw the direct impact the organization has on the quality of affordable housing.

A number of suppliers are donating materials to the project, including Owens-Corning, Louisiana Pacific, Skil, Design House and Sterling Plumbing.

Photo courtesy of Habitat for Humanity

Volunteers work on interior of Seigle's-sponsored Habitat for Humanity home.

PEOPLE

RETAILERS

William K. Schlegel has been appointed vice president of lumber and building materials for **Builders Square**, San Antonio, Texas. He joined Builders Square in 1991 as divisional merchandise manager of lumber and building materials and was formerly with Handy Andy and Wickes Lumber. His responsibilities will include overseeing regional lumber buyers.

ACO Hardware has promoted ***Michael Pai***, a 4-year employee to director of import division; ***Robert Dunlap***, a 16-year employee, to director of operations; ***Patti Rotta***, a 25-year employee, to vice president of advertising; and ***Dennis DaPra***, an 18-year employee, to senior vice president, general merchandising manager.

WHOLESALE

Furman Lumber, Billerica, Mass., has named ***Michael R. Mize*** a vice president. He has been in the lumber business since 1964. ***Norman L. Gross*** has also been named as a vice president of the company. ***Edwin L. Doyle*** has been appointed senior vice president of sales. ***William G. George*** has been named the company's senior vice president of product management. ***Michael Scolavino*** has been appointed as senior vice president of operations.

SUPPLIERS

Thomas E. Mahoney has been appointed president and general manager of **Stanley Hardware**, New Britain, Conn. Most recently, Mahoney was president and general manager of Stanley's national hand tool organization in Dallas. He is replacing Dick Martin who left the company.

Gene McClung has been appointed as Chairman of the Board at **Royal Rubber**, South Gate, Calif. ***Bruce Crenshaw*** has been appointed president and ceo and ***Donald Droesch*** as senior vice president of sales and marketing.

Michael P. Hoopis has been appointed as president and general manager of **Price Pfister**, a division of Black & Decker, Pacomia, Calif. He joined Black & Decker in 1989. Most recently, he was president of Kwikset Corp.

Anderman re-enters industry

CHATSWORTH, Calif. - Arthur Anderman, the founding publisher of *National Home Center News*, has returned to the home improvement industry as one of the four principals of a new bathroom vanity company.

Hotline, a manufacturer of cultured marble tops and bathroom cabinets, began about a year and a half ago by former Commodore vanity executives Bob Salas and Larry Pallitz. Donald Hervey, who used to be president of Beauty Craft vanities, has also joined the three men in the new venture.

Arthur Anderman

Hotline will sell high quality marble tops and cabinets to both retail home centers and distributors, said Anderman. The products will be sold at a promotional price point only.

"We want to fill a promotional niche and serve the needs of the industry," he said.

Anderman left *National Home Center News* in March 1985 to become publisher of *Nation's Restaurant News*, another Lebhar-Friedman publication. He subsequently held several other posts including group publisher of daily and weekly *Variety*.

Correction

A lumber column about treated wood (*NHCN*, June 22), should have noted that Jerry Harke, of the American Wood Preservers Institute, was surprised, not startled, by a focus group finding related to bar coding and the need to provide consumer information.

NATIONAL NEWS

Rickel cofounder returns

Industry veteran buys Gannet Hardware in Virgin Islands

ST. CROIX, Virgin Islands — After an absence of eighteen years, Al Rickel, the cofounder of Rickel Home Centers returned to the home improvement industry with the purchase of two hardware stores here.

In June, Rickel paid $2 million for Gannet Hardware which has stores in Gallows Bay and Sunny Isle. These are supplied from a distribution center in Ocala, Fla.

Rickel is renovating the St. Croix stores and looking at sites on two other islands to expand the company.

"There's great opportunity and potential there," said Rickel, who has a second home in St. Croix. "It's something the island can use and a chance [for Gannet] to be more aggressive."

Photo courtest of Gannet Hardware

Gannet Hardware in Gallows Bay was one of two stores that Rickel bought in the Virgin Islands.

It's over 45 years since Al, and his brothers Bob and Mort founded, Rickel Bros., the heating and installation company that eventually became the Rickel Home Center chain. Al, the president, retired in 1974 just six years after he and his brothers sold the chain to Supermarkets

(Continued on page 191)

Florida dealer group sues Ace

Charges co-op violated wholesaler franchise agreement

FT. LAUDERDALE, Fla. — A group of Ace dealers here filed suit against the co-op, alleging Ace violated its franchise agreement by giving a wholesaler a franchise.

The controversy is focused on One Source Supply, the Hollywood, Fla., company which became an Ace member last December.

One Source Supply's president, Freeman Cohen, describes the firm as a "supply company for commercial and industrial accounts, not a wholesale company." But an occupational license issued by the City of Hollywood, Fla., this year describes the business as a wholesale merchant. A number of Ace dealers would agree.

In a letter written last January to Roger Peterson, the president and ceo of Ace Hardware Corp., six dealers asserted that One Source "is now and always has been a whole-

(Continued on page 190)

Environment key trend at Expo '92

lawn and garden regulations drive new products focus

LOUISVILLE, Ky. — Three powerful trends seemed to shape the products and strategies of lawn and garden manufacturers that were exhibited at Expo '92, the lawn and garden show held in Louisville July 26 to 28.

These trends are:

- The environment and the need to comply with an increasing array of regulations;
- The ever-increasing strength of the mass market and its volume potential relative to traditional distribution channels; and
- The need to differentiate product offerings from the competition.

These influences were evident in the emphasis on mulching mowers which resulted, in part, from environmental pressures. Such pressures also had an impact on engine design.

Several suppliers announced new approaches for increasing their presence in the mass market.

And fashion has become an aspect of power equipment marketing, as manufacturers introduce a modern color palette.

Meanwhile, the horsepower

(Continued on page 202)

Factory Unit Shipments of Outdoor Power Equipment

Equipment	1991	% Chg.	1992*	% Chg.	1993*	% Chg.
Walk-Behind Mowers	5,350,000	(6.1%)	5,224,304	(2.3%)	5,694,813	(9.0%)
Rear-Engine Riding Mowers	209,000	(15.4)	194,723	(6.8)	195,415	(0.4)
Front-Engine Mowers	840,000	(5.1)	868,203	(3.4)	940,690	(8.3)
Garden Tractors	128,000	(17.9)	132,274	(3.3)	148,031	(11.9)
All Riding Units	1,177,000	(8.6)	1,195,199	(1.5)	1,284,136	(7.4)
Tillers	296,000	(1.3)	341,844	(15.5)	353,036	(3.3)

*Projections
Model year runs from September through August; figures are unit sales for each year ending in August.
Source: Outdoor Power Equipment Institute — *NHCN* chart

NHCN offers concise look at trends

This issue covers issues like the health care crisis and timber supply

by Ken Schept

At this time of the year there are two good ways to get an immediate handle on what's happening in the home improvement industry.

Effectively work the combined Hardware Show and the National Building Products Exposition & Conference this week and read this 206-page issue of *National Home Center News.*

This special hardware show issue includes reports about these key industry issues:

Timber Supply: It's a complicated issue that balances the need for lumber and the economic vitality of its producers against our obligation to protect the environment.

National Home Center News senior editor Gary Ruderman, who has written about lumber for the past five years, recently visited the Northwest, spending time with forest products executives, environmentalists and walking in the woods. His insightful special report begins on page 77.

Health Care Costs: They seem to be out of control. How does a business continue to serve its associates, but contain costs at a reasonable level? Some dealers are looking at managed-care alternatives. For an in-depth look at how this industry is coping, see "Rising health care costs shrink profits" by senior editor Elizabeth Brent.

Globalization: As the world economy changes, the place to look for ideas is everywhere. And that's what *National Home Center News* has done in the World Stores report.

This section illustrates the latest store developments from nine leading home improvement retailers in North America, Europe and the Pacific.

Texas Turnaround: It's happening slowly, but it's happening. Executive editor John Caulfield explores the Texas turnaround effort.

Also included in this issue are stories about the increasing amount of attention being paid to certain specific customer groups, such as the elderly (*page 85*) and Hispanic shoppers (*page 100*).

This issue also takes a look at a person who's had a sustained insider view of how companies respond to a rapidly changing industry.

For insight into the company and the man, see "George Poulos: Man on a mission: saving contractor yards," which begins on page 164.

Hardware stores are losing ground

Retail sales revisions show home centers grew more than reported

Wyatt Kash

For most of us, 1989, 1990 and 1991 are history.

For U.S. retailing, however, history was significantly revised recently. And the changes are worth a fresh glance into the industry's rearview mirror.

What one finds is the home center and retail building material industry did better in 1990 and 1991 than first reported, according to newly revised Census Bureau figures (*see chart*).

Moreover, the home center market, up a revised 3.0 percent in 1991, outpaced food retailing (+2.4 percent), general merchandise retailing (+2.3 percent) and durables retailing overall (-1.2 percent).

Perhaps of greater significance, though, are the revisions for hardware stores.

While home center sales were revised upward in 1990 and 1991, hardware stores lost ground, with the sales having now declined two years in a row.

What's behind the Census Bureau's revisions? Bureau staffers attribute them to changes in their survey sample group.

The complexion of the home center and hardware store sample group was based largely on a mix of companies established in the 1982 five-year retail census. Changes identified in the 1987 census were only recently incorporated in the sample group, and resulted in the most recent recalibration of 1989 to 1991 sales.

The new sales figures tend to confirm one trend we've seen shaping the industry for some time. Namely, that home centers have become high-volume "destination" stores for home improvement products, while hardware stores have increasingly become "convenience" stores.

Marketers certainly owe it to themselves to get the new figures. For details, call the Census Bureau at (301) 763-7128/7129.

U. S. Retail Home Center/ Hardware Store Sales
($ Billions)

Home Center/ LBM Stores		1989	1990	1991
Sales:	Rev.	$67.0	$69.7	$71.8
	Prev.	67.6	66.8	67.2
Growth:	Rev.	+0.6%	+4.0%	+3.0%
	Prev.	+1.5%	+1.2%	+0.6%
Hardware Stores		**1989**	**1990**	**1991**
Sales:	Rev.	$12.6	$12.4	$12.0
	Prev.	12.0	13.3	13.1
Growth:	Rev.	+7.7%	− 1.6%	−3.2%
	Prev.	+2.6%	+10.5%	−1.6%

Source: U.S. Department of Commerce — *NHCN chart*

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